

Managed Funds Fund Switch Form Trust/Company

Date of Submission		Use this form when you want to request a switch of some or all funds under the same investment number. The new allocation must add to 100%. Fund switch requests will take up to 5 business days to process. Any transactions underway prior to the completion of these changes will be applied using the previous fund allocation.	
Investor Details			
Investor First name			
Investor Surname			
Investment Number	NIK		
Switch Details - Existing Funds			
New Allocation Fund Name		Rebalance Existing Portfolio Percentage %	Future Contributions Percentage %
Please detail all funds and their new allocation			
		%	%
		%	%
		%	%
		%	%
		%	%
Additional Notes			

Signature 1:

Date:

Signature 2: (If needed)

Date: